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Crossborder Education: Programs and Providers on the Move

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1.0 INTRODUCTION

Globalization is transforming the world and internationalization is changing the world of higher education

The Global Student Mobility 2025 Report (2002) prepared by IDP Education Australia predicts that the demand for international education will increase from 1.8 million international students in 2000 to 7.2 million international students in 2025. By all accounts these are staggering figures and present enormous challenges and opportunities. It is not known what proportion of the demand will be met by student mobility but it is clear that there will be exponential growth in the movement of programs and institutions, and providers across national borders. New types of providers, new forms of delivery and new models of collaboration are being developed in order to take education programs to students in their home countries.

During the last five years the movement of education programs and providers across national boundaries has been a hotbed of activity and innovation. The following are examples of hundreds of new initiatives that have developed since 2002.

- Phoenix University has become the largest private university in the US (owned and operated by the Apollo Group company) and is now present or delivering courses in Puerto Rico, Netherlands, Mexico and Canada. Other Apollo companies are offering courses in Brazil, India and China.

- Three Canadian universities are formally working with the Al-Ahram Organization (a large private conglomerate) to establish the Al-Ahram Canadian University in Egypt.
- The Netherlands Business School (Universiteit Nijenrode) has recently opened a branch campus in Nigeria.
- In 2002, Australian universities had over 97,000 students enrolled in 1,569 crossborder programs. (This is in addition to foreign students at Australian-based institutions).

DURING THE LAST FIVE YEARS THE MOVEMENT OF EDUCATION PROGRAMS AND PROVIDERS ACROSS NATIONAL BOUNDARIES HAS BEEN A HOTBED OF ACTIVITY AND INNOVATION.

- The International Institute of Information Technology (India) is establishing a teaching centre in Moscow to offer its Master's and PhD programs.
- Dubai has developed a "Knowledge Village" in the Dubai Technology and Media Free Zone and to date the London School of Economics, India's Manipal Academy of Higher Education and the University of Wollongong (Australia) are offering courses through franchising agreements and branch campuses.
- Laureate Education (formerly Sylvan Learning Systems) has purchased whole or part of private

higher education institutions in Chile, Mexico, Panama and Costa Rica and owns universities in Spain, Switzerland and France.

- The University of Westminster (UK) is the key foreign academic partner in the new private Kingdom University of Bahrain and plays a similar advisory/provision role with new institutions in Nigeria, Uzbekistan and Kazakhstan.
- As of June 2003, 858 degree-level programs from 11 different countries were operating in Hong Kong, and Singapore had 522 degree-level programs from 12 foreign countries.
- Harvard University is developing two branch campus initiatives in Cyprus and United Arab Emirates.
- Jinan University will be the first Chinese university to open a branch campus outside China — in Thailand.
- Germany invested 14 million Euros in academic year 2003/2004 to encourage German universities to operate abroad and to increase foreign student enrolment in Germany.

TRADITIONAL HIGHER EDUCATION INSTITUTIONS (HEIs) ARE NO LONGER THE ONLY DELIVERERS OF ACADEMIC COURSES AND PROGRAMS. INTERNATIONAL CONGLOMERATES, MEDIA AND IT COMPANIES ARE INCREASINGLY ENGAGED

These examples involve higher education providers (including institutions and companies) delivering their courses and programs to students in their home countries. It is convincing evidence that it is no longer just students who are moving across borders and that, even though in colonial times there was significant mobility of institutions, we have now entered a new era of cross-border education.

1.1 PURPOSE

The knowledge society, Information and Communications Technologies (ICTs), and the market economy are increasing the demand for tertiary and continuing education. This is leading to increased crossborder education provision involving new types of education providers, new modes of delivery, new programs and qualifications, new partnerships and affiliation models, new national regulations and in general, a shift from academic cooperation and exchange to commercial trade.

A fascinating but very complex world of crossborder education is emerging. The purpose of this paper is to delve into some of the trends, issues, challenges and implications of these new developments. The objectives are: 1) to clarify the relationships between globalization, internationalization, crossborder education and trade of educational services; 2) to provide concrete examples of the current types and models of program and provider mobility; 3) to try to develop a conceptual map of concepts, terms and issues related to crossborder education; and 4) to identify issues and implications that need to be addressed at the system level, such as quality assurance of providers and recognition of qualifications.

Given the rapid and perhaps tumultuous expansion of international academic mobility, it is important to be clear about the parameters of this paper. The primary focus is on the movement of education programs and providers across borders, not the mobility of students. The emphasis is on higher education, however many of the issues and challenges apply to other levels. It is important to recognize that in crossborder education

there are different perspectives and issues depending on whether one is a receiving (host) country or a sending (source) country; this paper aims to address both perspectives. More attention is given to fee-based and commercial forms of crossborder education, than to develop-

ment cooperation projects or academic exchange agreements. The paper concentrates on the provision of credit-based courses and programs leading to certificates/degrees and does not address in any substantial way the crossborder mobility of research and scholarly initiatives. The discussion of issues and challenges is targeted to system level policies and responsibilities.

1.2 TERMINOLOGY

The language of internationalization is changing and differs within and between countries. Even though one of the objectives of this paper is to make sense of the myriad of new terms that are emerging, it is important to clarify how key concepts are interpreted and used.

Traditional higher education institutions (HEIs) are no longer the only deliverers of academic courses and programs. International conglomerates, media and IT companies, new partnerships of private and public bodies are increasingly engaged in the provision of education

THERE IS GREAT CONFUSION ABOUT THE MEANING AND USE OF THE TERMS 'TRANSNATIONAL, CROSSBORDER, AND BORDERLESS' EDUCATION. THE PREFERRED TERM FOR THIS PAPER IS CROSSBORDER EDUCATION AS IT IS THE PRESENCE OF NATIONAL BORDERS WHICH IS KEY TO MANY OF THE REGULATORY, QUALITY, ACADEMIC AND FINANCIAL ISSUES RELATED TO THE NEW MOBILITY OF PROGRAMS AND PROVIDERS.

both domestically and internationally. The term education provider is now becoming a more common and inclusive term as it includes traditional HEIs as well as organizations and companies. This paper uses the term providers to mean all types of entities that are offering education programs and services. There is some criticism directed towards the use of the term 'providers' as it seems to be buying into the 'marketization and corporatization' agenda. This is a sign of the times and every attempt

is made not to adopt the trade and commercial language of 'suppliers, consumption abroad, commercial presence', etc. There is great confusion about the meaning and use of the terms 'transnational, crossborder, and borderless' education. This will be addressed in Section 2.3. The preferred term for this paper is crossborder education as it is the presence of national borders which is key to many of the regulatory, quality, academic and financial issues related to the new mobility of programs and providers.

1.3 OUTLINE

The outline of this paper is as follows. The second section addresses the context and challenges facing the international dimension of education. An analysis of the major elements of globalization and their impact on higher education is provided. Most importantly, the relationship of globalization, internationalization, crossborder education and trade in education services is explored. New developments in crossborder education around the world are highlighted in section three and a comparison of the volume and types of crossborder activities from Australia, UK and New Zealand higher education institutions is provided. In the fourth section, the plethora of new terms, concepts and issues related to crossborder education is addressed and a conceptual map in the form of typologies is presented to clarify some of the confusion and misunderstanding. The last section concentrates on the identification of issues and implica-

tions in terms of the recognition of providers and their qualifications, the quality assurance of the programs being delivered, and the role of national, regional and international regulatory frameworks.

2.0 GLOBALIZATION, INTERNATIONALIZATION AND CROSSBORDER EDUCATION

The purpose of this section is to discuss the realities of the environment in which higher education, and especially the international dimension of higher education, is working. Secondly, it is important to clarify the connections among globalization, internationalization, crossborder education and trade as these processes are intertwined in a complicated and confusing way. The following sections attempt to shed some light on the evolution and relationship of these processes.

2.1 GLOBALIZATION: CHANGES AND CHALLENGES

There are many changes and new challenges in how the environment is impacting internationalization and how growing international dimension of higher education is an agent of change itself. Globalization is probably the most pervasive and powerful driver of changes in today's environment. Globalization is a term and a phenomenon which is on the minds of policy makers, academics and professionals/practitioners from all sectors and disciplines. Education is no exception. The role of education—particularly postsecondary education—as both agent and reactor to globalization is a critical area of debate and study. The discussion, in terms of the nature, causes, elements, consequences and future implications of globalization on education is prolific, rather controversial and very important (Altbach, 2004; Breton and Lambert, 2003; Enders and Fulton, 2003; Marginson, 2001; Scott, 2000). However, for the

purposes of this discussion, a neutral or non-ideological definition of globalization is purposely adopted, and secondly, globalization is positioned as a key environmental factor that has multiple effects—both positive and negative—on education.

It is important to note that the discussion does not centre on the ‘globalization of education’—rather, globalization is presented as a phenomenon impacting internationalization. In fact, substantial efforts have been made during this past decade to maintain the focus on the ‘internationalization of education’ and to avoid using the term ‘globalization of education’. This has had mixed results, but some success has been achieved in ensuring that these two terms are not seen as synonymous and are not used interchangeably.

Globalization is defined as “the flow of technology,

SUBSTANTIAL EFFORTS HAVE BEEN MADE DURING THIS PAST DECADE TO MAINTAIN THE FOCUS ON THE ‘INTERNATIONALIZATION OF EDUCATION’ AND TO AVOID USING THE TERM ‘GLOBALIZATION OF EDUCATION’.

economy, knowledge, people, values, and ideas . . . across borders. Globalization affects each country in a different way due to a nation’s individual history, traditions, culture and priorities. Globalization increases and reflects the growing connectivity and interdependence among nations” (Knight & de Wit, 1997, p. 6). This definition acknowledges that globalization is a multi-faceted process and can impact countries in vastly different ways but it does not take a position as to whether this impact has positive and/or negative consequences.

There are a number of factors that are seen as fundamental aspects of globalization. These include the knowledge society, information and communication technologies, the market economy, trade liberalization and changes in governance structures. It can be debated whether these are catalysts for globalization or whether they are consequences of globalization, but for this discussion they are presented as elements or factors of globalization which have an enormous impact on the education sector.

Chart One describes each of these five elements of globalization and notes some of the key implications for postsecondary education in general and the international dimension in particular. This chart presents highlights only, not a complete analysis. Its purpose is to illustrate several of the major environmental changes that are shaping the responses and actions of internationalization to globalization. It is important to note that these implica-

tions relate to all aspects of internationalization—the curriculum and teaching process, student and academic mobility, crossborder delivery of education programs, international development projects, study of foreign languages, commercial trade, staff development, and others. The chart includes three columns, which are purposely not aligned because the impact of globalization is not linear. The elements of globalization listed in the first column have implications for many different aspects of higher education and in turn the international dimension.

This chart attempts to position globalization and internationalization as different but closely linked processes. It reinforces the notion that globalization is a rather generic process which impacts different sectors, of which higher education is just one. Examples of how the international dimension of education is implicated are provided in order to show that internationalization of higher education is seen as both a reaction to and an agent of globalization.

Why is internationalization seen as being both a response to and a catalyst for globalization? The “response to” position is based on the fact that higher edu-

cation needs to prepare students for living and working in a more connected, interdependent and globalized world, and secondly, that research and scholarship need to contribute to national and international issues. On the other hand, internationalization is seen as an agent of globalization, especially economic globalization or trade, because the market approach to higher education is becoming more active in the for-profit side of foreign student recruitment and commercial crossborder delivery of education.

2.2 INTERNATIONALIZATION: EVOLUTION AND EXPANSION

Only in the last two decades has the term internationalization been an important part of higher education vocabulary. Prior to this time, international development cooperation, international academic affairs and foreign students were the key concepts used to describe the kind of international activities that post-secondary institutions engaged in. Beginning in the mid-eighties internationalization of higher education, interpreted in the broadest sense, started to increase in importance, scope and volume. Evidence of this includes

- growing number of students, professors, and researchers participating in academic mobility schemes

- increase in the number of courses, programs and qualifications which focus on comparative and international themes
- increased crossborder delivery of academic programs
- development of new international networks and consortia
- increase in campus based extra-curricular activities with an international or multi-cultural component
- impetus given to recruitment of foreign students
- rise in number of joint or double degrees
- expansion of partnerships, franchises, offshore satellite campuses
- establishment of new national organizations focused on international education
- new regional and national level government policies and programs supporting academic mobility and other internationalization initiatives

It is interesting to look at the way in which definitions/meanings of terms need to evolve to reflect new developments and also to help shape new policy and programs. Given the changes in rationales, providers, stakeholders and activities of internationalization, it is important to revisit the question of definition and ensure that the meaning reflects the complex realities of today and is able to guide and be relevant to new developments. It is increasingly clear that internationalization needs to be understood both at the national/system level as well as at the institutional level. Therefore, a new definition is proposed which acknowledges both levels and the need to address the relationship and coherence between them.

The challenging part of developing a definition is the need for it to be generic enough to apply to many different countries, cultures and education systems. While it is not necessarily the intention to develop a universal definition, it is imperative that it be appropriate for use in a broad range of contexts and for comparative purposes across countries/regions of the world. With this in mind, it is important to ensure that a definition does not specify the rationales, benefits, outcomes, actors, activities, and stakeholders of internationalization as they vary enormously across nations and also from institution to institution. What is critical is that the international dimension relates to all aspects of education and the role that it plays in society. The following working definition is proposed:

Internationalization at the national/sector/institutional levels is defined as “the process of integrating an

international, intercultural or global dimension into the purpose, functions or delivery of post-secondary education” (Knight 2003, p.2).

This is intentionally a neutral definition of internationalization. Many would argue that the process of internationalization should be described in terms of promoting cooperation, and solidarity among nations, improving quality and relevance of higher education or contributing to the advancement of research for international issues. While these are noble intentions and internationalization can contribute to these goals, a definition needs to be objective enough that it can be used to describe a phenomenon which is in fact universal but which has different purposes and outcomes, depending on the actor or stakeholder. Therefore, it is important to explain why specific terms and concepts have been carefully chosen for the proposed working definition of internationalization.

The term ‘process’ is deliberately used to convey that internationalization is an ongoing and continuing effort. ‘Process’ denotes an evolutionary or developmental quality to the concept. The concept of ‘integration’ is specific

INTERNATIONALIZATION AT THE NATIONAL/SECTOR/INSTITUTIONAL LEVELS IS DEFINED AS THE PROCESS OF INTEGRATING AN INTERNATIONAL, INTERCULTURAL OR GLOBAL DIMENSION INTO THE PURPOSE, FUNCTIONS OR DELIVERY OF POST-SECONDARY EDUCATION.

cally used to denote the process of infusing or embedding the international and intercultural dimension into policies and programs in order to ensure that the international dimension remains central — not marginal — and sustainable. The concepts of ‘purpose, function and delivery’ have been carefully chosen and are meant to be used together. Purpose refers to the overall role and objectives of higher education for a country or mission of an institution. Function refers to the primary elements or tasks that characterize a national post-secondary system or individual institution. Usually these include teaching, research and service/outreach to society. Delivery is a narrower concept and refers to the offering of education courses and programs either domestically or in other countries. This includes delivery by traditional higher education institutions but also by new providers such as multi-national companies who are often more interested in the global delivery of their programs and services than the international or intercultural dimension of a campus or research and service functions.

CHART ONE: IMPLICATIONS OF GLOBALIZATION FOR INTERNATIONALIZATION

Element of globalization	Impact on higher education	Implications for the international dimension of higher education
<p>Knowledge Society Increasing importance attached to the production and use of knowledge as a wealth creator for nations</p>	<p>Growing emphasis on continuing education, lifelong learning and continual professional development creating a greater unmet demand for postsecondary education</p> <p>Need to develop new skills and knowledge resulting in new types of programs and qualifications</p> <p>Role of universities in research and knowledge production is changing and becoming more commercialized</p>	<p>New types of private and public providers delivering education and training programs across borders. For example, private media companies, networks of public/private institutions, corporate universities, multinational companies</p> <p>Programs more responsive to market demand. Specialized training programs being developed for niche market and for professional development purposes and distributed on a worldwide basis</p>
<p>ICTs New developments in information and communication technologies and systems</p>	<p>New delivery methods used for domestic and crossborder education, especially on-line and satellite based</p>	<p>Increased international mobility of students, academics, education and training programs, research, providers and projects. Mobility is physical and virtual</p>
<p>Market Economy Growth in number and influence of market-based economies around the world</p>	<p>Greater commercialization and commodification of higher education and training at domestic and international levels</p>	<p>Innovative international delivery methods such as e-learning, franchises, satellite campuses require more attention given to accreditation of programs/providers and recognition of qualifications</p>
<p>Trade Liberalization New international and regional trade agreements developed to decrease barriers to trade</p>	<p>Import and export of educational services and products increased as barriers removed</p>	<p>New concerns about appropriateness of curriculum and teaching materials in different cultures and countries and the potential for homogenization as well as new opportunities for hybridization</p>
<p>Governance Creation of new international and regional governance structures and systems</p>	<p>The role of national level education actors both government and non-government is changing</p> <p>New regulatory and policy frameworks being considered at all levels</p>	<p>Increasing emphasis on commercially oriented export and import of education programs and diminished importance to international development projects</p> <p>New international/regional frameworks under consideration to complement national and regional policies and practices especially in the areas of quality assurance, accreditation, credit transfer, recognition of qualifications, mobility of students</p>

Another interesting development in the internationalization vocabulary is the growing use of two new terms which reflect two related but different streams or components. of internationalization (Knight 2003a). The first is 'internationalization at home' (Nilsson, 1999) which refers to the international and intercultural dimension of curriculum, the teaching/learning process, research, extra-curricular activities, in fact a host of activities which help students develop international understanding and intercultural skills without leaving the campus. The second component is 'internationalization abroad' which involves students, teachers, scholars, programs, courses, curriculum and projects moving between countries and cultures, in short, across borders.

2.3 CROSSBORDER EDUCATION: INNOVATION AND COMPLEXITIES

Crossborder education is a term that refers to the movement of education across national jurisdictional or geographic borders. In the past decade, the interest and growth in international academic mobility has exploded. This increased mobility is reflected in the introduction of new terminology to try to describe or characterize this delivery of education internationally. Crossborder is a term that is often used interchangeably with other terms such as transnational, offshore, and borderless education.

Australians were among the first to use the term 'transnational education' as they wanted to differentiate between the recruitment of international students to Australian campuses and those who were studying for Australian degrees offshore. Hence the term transnational education became used to simply describe offshore international student enrolments regardless of delivery method.

The Global Alliance for Transnational Education (GATE) which was established as an independent organization in 1996 has, over the years, changed in terms of governance and ownership but has remained dedicated to disseminating good practices in transnational education and offering certification services. The definition created by GATE is "Transnational education.... denotes any teaching or learning activity in which the students are in a different country (the host country) to that in which the institution providing the education is based (the home country). This situation requires that national boundaries be crossed by information about the education, and by staff and/or education materials." In today's

world where education providers are moving across borders, this definition appears to be more applicable to program mobility than provider mobility. In fact, it is curious to note the similarities that now exist between this first definition of transnational education and the current definition that is being used to describe distance education. Perhaps this is also reflected in the fact that GATE is now managed by the US Distance Learning Association.

UNESCO and the Council of Europe in their 'Code of Practice on Transnational Education' have described transnational education in a similar way. They define transnational education to mean 'all types of higher education study where the learners are located in a country different from the one where the awarding institution is based' (UNESCO/Council of Europe, 2001). Again, this definition is useful for some crossborder movement of programs but may have limited application for the growth in provider mobility. For instance, there are private companies which are establishing independent or stand alone higher education institutions which are not

CROSSBORDER EDUCATION IS A TERM THAT REFERS TO THE MOVEMENT OF EDUCATION ACROSS NATIONAL JURISDICTIONAL OR GEOGRAPHIC BORDERS.

attached to a "home" university but instead are attached to a "home" company. Would one describe this situation as the learner being located in a different country than the awarding institution?

Another, more complex example is the Royal Melbourne Institute of Technology (RMIT) from Australia. It has established a full institution in Vietnam, which offers a wide selection of programs complete with the physical facilities and the necessary administrative, academic, technological, socio-cultural services. Is it appropriate to describe this situation as the 'learners being located in a country different from the one where the awarding institution is based'? In technical terms, the answer may be yes, because RMIT Vietnam still has its degree conferring power from Australia, even though it may deliver programs in Vietnam that are not offered in Australia. Yet, the student at RMIT Vietnam is studying in a full Vietnam-based RMIT campus. These same questions will apply to the new campus that the University of South Wales (Australia) will establish in Singapore. Another example, when Laureate Education

ANOTHER REASON THAT A NEW FRAMEWORK IS PROPOSED IS TO OFFER AN ALTERNATIVE TO THE TRADE FRAMEWORK OF THE GENERAL AGREEMENT IN TRADE OF SERVICES (GATS) .

purchases and operates a domestic institution in for instance Chile, are the learners located in a different country than the awarding institution? The answer is no. The provider has moved across national borders to purchase a local university which continues to confer the awards. These examples serve to raise questions about the 'grey zone' in terms of power to award qualifications when providers moving across borders. The GATE and UNESCO/Council of Europe definitions of transnational education are oriented and applicable to situations where the programs moves across a border or where the program or provider are virtual and delivering by distance. It is unclear as to whether they cover the new modes of providers moving across borders.

The term borderless education first appeared in an Australian report by Cunningham et al (2000) and was followed by a similar type of study in the United Kingdom. Basically the term borderless education refers to 'the blurring of conceptual, disciplinary and geographic borders traditionally inherent to higher education' (Council of Vice-Chancellors and Principals 2000). An important development following the publication of these reports was the establishment of the Observatory of Borderless Higher Education (OBHE) in the UK.

It is interesting to juxtapose the concepts of borderless education and crossborder education. The former term acknowledges the disappearance of borders while the latter term actually emphasizes the existence of borders. Both approaches reflect the reality of today. In this period of unprecedented growth in distance and e-learning education, geographic borders seem to be of little consequence. Yet, on the other hand, we can detect a growing importance of borders when the focus turns to regulatory responsibility, especially related to quality assurance, funding and accreditation. The OBHE uses both borderless and transnational education in their reports. A close look at how OBHE applies these terms shows that it often uses the terms interchangeably and secondly, transnational education often includes the mobility of international students (in addition to programs and providers). Thus the OBHE use of the term differs from the Australian and the European approaches. This is yet another example of the varied uses of the term transnational education and the potential for confusion.

South Africa has recently developed a code of conduct

for crossborder mobility of programs and providers and has provisionally called it the Code of Conduct of Crossborder/Transnational Higher Education Programs, signaling the similarities between the terms but confusion as to

which one to use.

This discussion on the different meanings of transnational education is meant to illustrate how difficult it is to understand how different countries use the term. This has significant implications for how data is collected and how regulatory frameworks are created. In order to avoid the minefield of differing and sometimes contradictory terminology, a framework has been introduced to provide some clarity and hopefully common understanding about this phenomenon of education crossing borders.

Another reason that a new framework is proposed is to offer an alternative to the trade framework that the General Agreement in Trade of Services (GATS) has introduced into the higher education sector. The GATS is a worldwide agreement managed by the World Trade Organization to further liberalize trade in services. Education is categorized as a service, in the same way that transportation, communication, health and culture sectors are. The GATS has identified four modes of trade or supply of services. They are as follows:

Mode 1: Crossborder supply focuses on the service crossing the border, which does not require the consumer to physically move. Examples in higher education include distance education and e-learning.

Mode 2: Consumption Abroad refers to the consumer moving to the country of the supplier which in education means students taking all or part of their education in another country.

Mode 3: Commercial Presence involves a service provider establishing a commercial facility in another country to provide a service. Examples in higher education include branch campuses or franchising arrangements.

Mode 4: Presence of Natural Persons means persons traveling to another country on a temporary basis to provide service. In the education sector, this would include professors or researchers.

In short, Mode 1 deals with the service moving, Mode 2 deals with the consumer moving, Mode 3 deals with the provider and investment moving and Mode 4 deals with human capital moving. There is no criticism

implied regarding the central features of the four modes for trade services. On the contrary, it is quite an accomplishment to develop a generic framework to apply to the supply of commercial services for the 12 major service sectors and 160 subsectors included in GATS.

The concern about these four trade modes focuses on the fact that they are now beginning to be seen as the four primary elements and methods of crossborder education and as such, they do not capture or reflect the fullness of crossborder education activity. As more attention is given to the analysis of major actors, stakeholders, rationales, benefits, and as one examines the implications for quality assurance, credential recognition, accreditation, funding, access, it is important that these matters are addressed for the larger picture of crossborder education. Using a trade framework to categorize crossborder activity is one approach, but, given these new developments and the emerging issues, it is argued that a trade framework is too limited and an education framework is needed. The next section focuses on the process of developing a conceptual framework to address the scope of crossborder higher education.

2.4 CROSSBORDER EDUCATION FRAMEWORK

What are the defining factors/principles for a conceptual framework of crossborder education? Many come to mind: what elements of education move? How does the movement occur? Why does education move? Where is it happening? Who is funding it? Who is awarding the qualification? Who is regulating it? Given the changing nature of the rationales driving crossborder education, the worldwide scope of delivery and the new modes of provision, the 'why, how and where' are eliminated as the defining factors.

Emphasis is placed on 'what' moves across borders and four different categories are suggested: people, programs, providers and projects/service. The four categories used to classify "who/what" moves across borders are described below:

People

The first category covers the movement of people whether they are students or professors/scholars/experts. Students are mobile in a number of ways. They can take whole degrees in another country, participate in a study abroad exchange program, undertake field work or an internship, register for a

semester/year abroad program, etc. The funding for such crossborder education can be through exchange agreements, scholarships from government, public or private sources and self-funding. Professors, scholars and experts can be involved in teaching and research activities, technical assistance and consulting assignments, sabbaticals, seminars and other professional activities. These types of initiatives can be self or institution funded, based on exchange agreements, involve contracts and fee for service, or supported by public and private funding.

Programs

The program, not the student, moves in this category. The delivery of the program is often done through a partnership arrangement between international/foreign and domestic providers or can be an independent initiative by a foreign provider. The programs can be delivered by distance, face-to-face, or mixed mode. Franchising, twinning and new forms of articulation and validation arrangements are most common. In some cases, the program and qualification awarded is provided by the source country institution/provider but the teaching and support is done in part or totally by a local institution/provider. In other cases, the foreign provider takes complete responsibility for the delivery of the academic program but may have a local business partner investing in the operation. Distance delivery of a program involves yet another set of circumstances.

GIVEN THE CHANGING NATURE OF THE RATIONALES DRIVING CROSSBORDER EDUCATION, THE WORLDWIDE SCOPE OF DELIVERY AND THE NEW MODES OF PROVISION, THE 'WHY, HOW AND WHERE' ARE ELIMINATED AS THE DEFINING FACTORS.

Providers

The key factor in this category is that the institution/provider moves to have physical or virtual presence in the receiving/host country. It is not the student who moves, the provider moves to serve the student. The movement of a provider can involve a more substantial range of programs and academic/administrative support services moving. A provider can establish a satellite campus or establish a full institution. In other scenarios the provider moves by purchasing/merging with a local institution. Virtual universities are yet another example of

the provider moving across borders through distance delivery of a selection of programs. The providers can include private and public, for-profit or non-profit, educational institutions, organizations and companies. Both recognized bona fide institutions/providers and non-recognized "rogue" providers are included in this category.

Projects/services

There are a wide range of education related projects and services which need to be considered when analyzing crossborder education. Such activities could include a diversity of initiatives such as joint curriculum development, research, benchmarking, technical assistance, e-learning platforms, professional development and other capacity-building initiatives especially in the information technology area. The projects and services could be undertaken as part of development aid projects, academic linkages, and commercial contracts.

A second set of key factors relate to the fact that crossborder education occurs under different kinds of arrangements. Therefore, three different sets of conditions for crossborder delivery are proposed: 1) develop-

ment cooperation/aid education projects, 2) academic exchanges and linkages, and 3) commercial trade initiatives. (In contrast, the GATS framework only covers commercial trade types of activities.)

Chart Two presents a framework for crossborder education based on two elements: what moves — people, providers, programs, and projects and under what conditions — development cooperation projects, academic exchange and linkage agreements, and commercial/profit-oriented initiatives.

This chart can also be used to illustrate significant trends or shifts in crossborder education, and perhaps for internationalization in general. The first trend is the focus of this paper — the vertical shift downwards from student mobility to program and provider mobility. It is important to note that the number of students seeking education in foreign countries is still increasing. However, there is currently new emphasis being placed on taking foreign academic courses and programs to students in their home country. Thus the desirability of a foreign education and qualification remains high, but students do not have to leave home to get it.

The second shift is from left to right signifying substantial change in orientation from development cooperation to competitive commerce or, in other words, from

CHART TWO: FRAMEWORK FOR CROSSBORDER EDUCATION

Category	Means	Conditions of Crossborder Activity		
<i>People</i> ↓	<ul style="list-style-type: none"> • Students • Professors/Scholars • Researchers/ • Experts/consultants 	<div> Development Cooperation → Exchanges/ Linkages → Commercial/ Profit orientated </div>		
<i>Programs</i> ↓	<ul style="list-style-type: none"> • Stand Alone • Twinning • Franchised • Articulated/Validated • Joint/Double Award • Online/Distance 			
<i>Providers</i> ↓	<ul style="list-style-type: none"> • Branch Campus • Virtual University • Merger/Acquisition 			
<i>Projects</i>	<ul style="list-style-type: none"> • Capacity Building • Research • Curriculum Development • Educational services 			

aid to trade. However, it would be an oversight not to recognize the substantial amount of crossborder activity that is happening under the academic exchange and linkage category by HEIs. The next section will provide a number of concrete examples of this growing phenomenon of crossborder program and provider mobility.

3.0 DEVELOPMENTS IN PROGRAM AND PROVIDER MOBILITY AROUND THE WORLD

The growth and changes in crossborder program and provider mobility are remarkable. This section aims to provide a glimpse of these changes by identifying some of the new and interesting developments in crossborder education provision around the world. It is important to point out that this information reflects the mobility of programs and providers across borders, but does not include any of the innovative activities oriented to increasing student mobility or research/scholarship initiatives. The first part provides highlights of new crossborder activity by region of the world.

There is a serious lack of solid data on the volume and type of crossborder program and provider mobility. Institutions and national education systems have invested a lot of effort to gather reliable data on student mobility, but it is only in the last five years that countries and international organizations are starting to track program and provider mobility. There are huge challenges in this data collection due to a lack of a common set of terms, and different systems of gathering data. However, Australia, New Zealand and more recently the UK have been gathering statistics from the recognized HEIs on the extent of their crossborder education provision. A tentative analysis of crossborder activity in these three countries is included in this part of the paper. It is described as tentative as any analysis is only as good as the data, and there is no assurance that comparable aspects of crossborder delivery are being examined; nonetheless, it certainly provides interesting trend data. These three countries, which are primarily provider countries, are the leaders in trying to systematically gather quantitative data. Other countries, notably in Europe, are collecting descriptive data on crossborder provision primarily focused on intra-European mobility.

3.1 INNOVATIVE NEW INITIATIVES

This section tries to illustrate the scope of new developments in program and provider mobility. The examples have been taken from the breaking news service of the Observatory on Borderless Higher Education which tracks and reports on the latest developments and trends in borderless education. Only those initiatives announced or established in the last two years are listed. There are more examples from conventional higher education institutions than from commercial company providers or from corporate universities, however, the increase from these 'new' types of providers should not be underestimated in terms of volume, innovation and impact.

Examples are from the Observatory of Borderless Higher Education (OBHE) unless otherwise noted.

Middle East

The diversity of new developments in the Middle East makes it a very interesting region to study. For example, Poland has been approved to establish a new private medical institute in Israel where students will study for three years before moving to the Medical University in

INSTITUTIONS AND NATIONAL EDUCATION SYSTEMS HAVE INVESTED A LOT OF EFFORT TO GATHER RELIABLE DATA ON STUDENT MOBILITY, BUT IT IS ONLY IN THE LAST FIVE YEARS THAT COUNTRIES AND INTERNATIONAL ORGANIZATIONS ARE STARTING TO TRACK PROGRAM AND PROVIDER MOBILITY.

Gdansk for three more years of clinical study and then return to Israel for an internship (November 2003). Saudi Arabia is in the process of establishing new private universities with the involvement of foreign institutions and investors. For instance, the Prince Sultan Private University is being established in cooperation with the University of Arizona and UNESCO. In addition the Dar-Al-Faisal University is being founded in cooperation with the Stevens Institute of Technology (US) and with financial investment from the Boeing Company and the French defence firm Thales (June 2003). It is also noteworthy that Harvard is planning to set up a branch campus in the United Arab Emirates (June 2004).

In Bahrain, a new Euro University is being planned in affiliation with the University of Hanover (Germany). Egypt is home to the American University established more than 80 years ago, but in the last three years the German University in Cairo and the Université française d'Égypte have been established and a new British University is under development. The partnership models between local and foreign partners are slightly different thereby illustrating the creativity and diversity of new forms of collaboration. An interesting example of this is the franchise agreement where the distance MBA program of Heriot-Watt University from the UK is being offered through the American University in Egypt (March 2004). The Al-Ahram Canadian University has already been cited (section 1.0).

THE SPEED OF CHANGE AND INNOVATION IN INDIA'S HIGHER EDUCATION SECTOR IS UNPRECEDENTED AND INCLUDES BOTH THE IMPORT AND EXPORT OF PROGRAMS AND SERVICES.

Asia Pacific

Vietnam is an emerging hotbed of activity with the development of 100% foreign owned branch campus of RMIT from Australia. The International College of IT and Management, established by Troy State University (US) is another example of a foreign branch campus. The University of Hue in Vietnam recently developed a franchised/joint degree bachelor's program in tourism with the University of Hawaii, and Hanoi University of Technology is currently offering master's and bachelor's degrees with higher education institutions from Belgium (1), France (8), Germany (1) Singapore (2) and the US (1). The Vietnamese government recently announced the development of the "International University in Vietnam" as another initiative to increase national capacity for higher education. It is expected that half the university teaching staff will be Vietnamese and the other half from foreign universities. The involvement of foreign institutions will build on and expand from the current links of Ho Chi Minh City National University (January 2004).

Thailand is another country of increasing importance for crossborder education and is an appealing destination for institutions and providers from Egypt, China, Australia, and the US. For example, the Egyptian Al-Azhar University and Jinan University from China both plan to open a branch campus in 2005. Swinburne University of Technology (Australia) has been operating a branch campus since 1998, although it is changing its

focus to industry training only. Troy State University has a teaching site in Bangkok for its MBA program and students can transfer to the US depending on funds and visa requirements. Other institutions operating in Thailand include the Thai-German Graduate School of Engineering as well as 13 Australian and nine UK universities (March 2004).

In Singapore, the University of New South Wales (Australia) will establish the first 100% foreign owned higher education institution. It plans to offer undergraduate and graduate level programs and to develop a strong research capacity. Other respected foreign institutions offering education programs and training in Singapore through joint ventures, exchanges and branch campus models include the Chicago University Graduate School in Business, Shanghai Jiao Tong University, Stanford University, Johns Hopkins University, the German Technische Universität München and Technische Universiteit Eindhoven from the Netherlands (April 2004).

It is also interesting to note the exporting activities of Singapore institutions. For example, the National University

of Singapore has developed a joint MBA with Fudan University aimed at both Chinese and Singapore students. It is also embarking on a new graduate school initiative for Chinese students to be located in Suzhou Graduate Town which is part of the Suzhou Industrial Park (September 2003).

Raffles LaSalle Limited from Singapore is a publicly traded company very active in providing programs in fashion and design in many Asian countries. It has a number of innovative partnership arrangements and spans many countries. OBHE (December 2003) describes it as "a remarkable instance of international partnership, combining a Singapore firm with branches in Australia, China, Malaysia and Thailand, accreditation from an Australian state and a Canadian province, degrees from an Australian and a UK university, and a number of in-country university and college partners."

The speed of change and innovation in India's higher education sector is unprecedented and includes both the import and export of programs and services. One of the more interesting initiatives is the partnership between the Caparo Group, a UK firm with interests in steel, engineering and hotels and Carnegie Mellon University (US) to set up a new campus in India (July 2003).

Africa

The Universiteit Nijenrode (Netherlands Business School), a private institution, has recently established a

new branch campus in Nigeria in partnership with the African Leadership Forum (AFL) which is a non-profit organization founded in 1988. This is one of the first such initiatives out-

side of South Africa (April 2004). In South Africa, in the last few years, there have only been a handful of foreign institutions with branch campuses including Monash and Bond from Australia, De Montfort (UK), and the Netherlands Business School. As a result of the recent review of all MBA programs offered in South Africa, three of the foreign institutions are leaving because of accreditation related issues. Monash will remain (it does not offer an MBA program) as well as the UK-based Henley Management College which is primarily a distance provider (June 2004). South Africa is an example of a country where there has been a decrease in the number of foreign programs being offered, largely due to government regulations and accreditation processes. Kenya is home to two private non-profit universities. The Aga Khan University from Pakistan opened a branch university campus in Kenya in 2002 which specializes in nursing education and Alliant International University from the US provides education in social sciences and the humanities (January 2004).

Mauritius is taking some bold new steps as it tries to establish itself as a "cyber island" by attracting foreign IT firms from the west and from India. A 'knowledge centre', described as a world-class integrated education and training complex, is a key aspect of its plans. To

date, there are already more than 50 foreign universities and professional bodies offering programs locally. These programs tend to be at the diploma or certificate level and in specialized fields (October 2003). The concept of attracting foreign education providers to support the education and training needs of the new 'cyber island' may have positive consequences in terms of stemming brain drain or even stimulating brain gain, but the impact on local education institutions is not yet known.

Europe

Russia is an example of a country undergoing major economic reform with major implications for the higher education sector. Many HEIs, for example the Moscow

MAURITIUS IS TAKING SOME BOLD NEW STEPS AS IT TRIES TO ESTABLISH ITSELF AS A "CYBER ISLAND" BY ATTRACTING FOREIGN IT FIRMS FROM THE WEST AND FROM INDIA.

International Slavonic Institute and the Moscow State University of Industry, are operating programs abroad, such as in Bulgaria. However, Russia is not only a sending country it is also a receiving country of programs through joint/double degrees, twinning, and franchise arrangements. For instance, the Higher School of Economics has a double degree program with the London School of Economics. The Stockholm School of Economics is operating in St. Petersburg and the University of Oslo's Centre for Medical Studies is in Moscow. The UK Open University is active through 80 business training centres across the country. The University of Southern Queensland is partnering with the Far Eastern National University in Vladivostok for program delivery (October 2003). The Pune-based International Institute of Information Technology plans to offer its Master's and PhD courses through the newly established Russian-Indian Centre for Advanced Computer Research in Moscow.

In Greece, the University of Indianapolis has been active for more than a decade, first through an articula-

A REVIEW OF THE PREVIOUS REGIONAL SECTIONS SHOWS THAT AMERICAN HEIs AND PRIVATE COMPANIES ARE PROBABLY THE MOST ACTIVE AND INNOVATIVE IN PROGRAM AND PROVIDER MOBILITY AROUND THE WORLD.

tion program whereby students would start their studies in Athens and then go to the US for completion of the program. This model has now evolved into a campus in Greece called the University of Indianapolis Athens (June 2004).

In terms of activities by private companies, Laureate Education owns a part or all of the Universidad Europa de Madrid in Spain, Les Roches and Gillion Hotel School in Switzerland and the Ecole supérieure du Commerce extérieur de Paris in France. Apollo International is offering its courses in the Netherlands, and Raffles La Salle from Singapore has recently signed an agreement with Middlesex University to offer their Bachelor's and Master's programs in fashion and design (December 2003).

North America

To report on US crossborder activities is a challenge because of the volume, diversity of providers and types of partnerships. A review of the previous regional sections shows that US HEIs and private companies are probably the most active and innovative in program and provider mobility around the world. One of the more interesting recent developments is that George Washington University is one of the first HEIs planning to open a branch in South Korea in 2006, now that the government of South Korea has changed its regulatory system to permit foreign providers. There are several examples of US program mobility into Korea through partnerships with local institutions and companies. For instance, Syracuse University, in conjunction with Sejong University in Seoul, offers a specially designed MBA

ONE OF THE MORE INTERESTING RECENT DEVELOPMENTS IS THAT GEORGE WASHINGTON UNIVERSITY IS ONE OF THE FIRST HEIS PLANNING TO OPEN A BRANCH IN SOUTH KOREA IN 2006, NOW THAT THE GOVERNMENT OF SOUTH KOREA HAS CHANGED ITS REGULATORY SYSTEM TO PERMIT FOREIGN PROVIDERS.

program for Korean students. Duke and Purdue Universities are also offering MBAs in Korea, and Stanford University is delivering online graduate and postgraduate courses and uses alumni as local tutors (August 2004). These types of crossborder activities from US HEIs can be found in many Asian countries, for example, China, Vietnam, Thailand, Malaysia, Singapore, Philippines and more recently India as well as the Middle East. The University of Missouri at St. Louis has been involved in the establishment of the first private university in Kuwait, the Gulf University of Science and Technology and has a similar relationship with the Modern College of Business and Science in Oman (February 2004).

An important feature of the US crossborder activity is the activity by private and publicly traded companies. The Global Education Index (GEI), developed by the OBHE, is a system of classifying many of the largest and more active publicly traded companies providing education programs and services. A scan of more than 50 companies (Garett, 2003) shows that the US is home to the majority of these companies. Some of the better-known ones include Kaplan (owned by the Washington Post),

Apollo Group, DeVry, Career Education Corporation and Laureate Education. Kaplan owns 57 colleges in the US but now owns the Dublin Business School – Ireland's largest private undergraduate institution. This is likely to be the first of many future purchases of foreign institutions (December 2003). The Apollo Group owns Phoenix University, which is the largest American private university and is aggressively seeking to broaden its foreign investments and holdings. Since 1995, Apollo has also owned Western International University (WIU) which runs a branch campus called Modi Apollo International Institute in New Delhi through a partnership with the KK Modi Group, an Indian industrial conglomerate. WIU has an agreement with the Canadian Institute of Business and Technology (CIBT) whereby CIBT offers WIU programs through its three business schools in Beijing (October 2003). Other smaller but nonetheless interesting initiatives include the establishment of Northface University by Northface Learning Inc. which offers degree programs in IT and business and has the backing of IBM and Microsoft. This will be a company to watch in terms of future international expansion (August 2004). The University of Northern Virginia is another small private univer-

sity offering programs in business and IT; it has recently opened a branch campus in the Czech Republic and has delivery partnerships in China and India (August 2004). These are only a few examples of the hundreds of new initiatives and partnerships that US HEIs and companies are undertaking to deliver education courses and programs to other countries of the world.

In terms of Canada, the first note to be made about provider and program crossborder activity is the lack of any systematic data on it from universities, colleges and school boards. Australia, New Zealand and now the United Kingdom are making significant efforts to collect annual statistics on crossborder program and provider mobility. Canada has yet to undertake this important task but needs to give serious consideration to doing so. It is assumed that there are many successful and innovative examples of HEI crossborder mobility but to date little information is available. This gives the impression, internationally and domestically, that Canada is primarily interested in international student recruitment to Canadian-based programs and is not active in the delivery of education programs abroad. There is not enough reliable or up-to-date data to confirm or reject this

hypothesis. The following information is therefore incomplete but illustrates some of the current developments.

Interestingly, more information is available about the activities of private commercial companies operating in Canada as importers or exporters than about public institutions.

In early 2004, the Canadian International Management Institute, a private post-secondary institution that represents the recruiting interests of 10 Canadian universities and colleges, signed a memorandum of understanding with the Chinese Scholarship Council to offer a foundation and credit transfer program to students in China wanting to gain Canadian University degrees. It is a five-year program during which students will be based in China for foundation studies, cultural adjustment and language training for the first three years. If students meet grade requirements they can continue their studies either in Canada or China for the final two years. The China-based partner for this initiative is the Shougang Institute of Technology, which is a municipally managed higher education institute specializing in manufacturing, business and services disciplines (June 2004).

The College of the North Atlantic-Qatar opened in 2003. The Canadian Bureau for International Education (CBIE) developed and negotiated the establishment of Canada's largest educational cooperation project to date. This initiative represents Qatar's first major educational partnership with Canada. The 10-year agreement provides for a turn-key operation that includes all of the infrastructure necessary to operate a full service Canadian college, including Canadian programs and degrees, diplomas and certificates in as many as 32 fields of study.

In partnership with an Egyptian investor, CBIE established the Canadian International School of Egypt (CISE) in 2002. The Cairo-based CISE is currently operating as an elementary and secondary school covering kindergarten through to Grade 10 but will expand to offer a full secondary program. With 200 students from more than 20 countries in its second year of operation, CISE uses the Ontario curriculum.

The Al-Ahram Canadian University in Egypt is Canada's first and to date only example of Canadian universities directly supporting the establishment of a new foreign university. The Al-Ahram Organization is a large company that owns the Egyptian daily newspaper. It is cooperating with McMaster University, Ecole Polytechnique de Montréal and the Université du Québec in Montreal to establish a new private university that is expected to enrol students as of September 2004.

THE AL-AHRAM CANADIAN UNIVERSITY IN EGYPT IS CANADA'S FIRST AND TO DATE ONLY EXAMPLE OF CANADIAN UNIVERSITIES DIRECTLY SUPPORTING THE ESTABLISHMENT OF A NEW FOREIGN UNIVERSITY.

The Serebra Learning Corporation is a publicly traded Canadian company offering generic and bespoke software plus more than 1,800 courses mainly in IT. Serebra is working with the Consortium for Global Education — a group of 45 Baptist higher education institutions in the US to provide quality assured IT training in the developing world. Serebra also played a key role in the creation of the Pakistan Virtual University (November 2003).

Another for-profit Canadian company is LearningWise located in Victoria, British Columbia. It was incorporated in 1999 and was established to serve as an intermediary between Canadian tertiary institutions and the Asian market. Currently it offers English as a Second Language Training on line and is promoting nursing programs for the University of Victoria. A 2003 change in legislation in BC now allows public out of province and private institutions to apply for university title and/or degree awarding powers. LearningWise has applied for permission to grant mixed mode MBA degrees (February 2004). While it claims it will serve the local system, it would not be a surprise to see it go overseas given its previous work in international education.

Several school boards in British Columbia are undertaking some interesting new crossborder initiatives in China. To date the only approved and operational public school offering the BC curriculum is the Dalian Maple Leaf International School in China. In 2004, 1,300 students were enrolled and there are claims that 100% of its graduates have been offered places at foreign universities. The Dalian school has a direct relationship with the BC Ministry of Education but there are currently six BC public school boards plus more than 10 private entrepreneurs that are planning to operate more than 21 for-profit schools in China. While China is the immediate destination, there are proposals being prepared for approval by BC Ministry of Education for schools in Egypt and Jordan. It is acknowledged that the rationale driving these new developments is to generate alternative sources of income for public schools, and secondly, to attract and facilitate the transfer of foreign students into BC universities. It is assumed that graduates of these approved schools will avoid many of the university entrance and English proficiency exams, but not the higher fees (January 2004).

In terms of private providers establishing a presence and offering programs in Canada, there are some inter-

esting developments. To date, Phoenix University has a program operating in British Columbia, De Vry has established a degree granting institution in Alberta and Lansbridge is delivering distance degree programs in New Brunswick. There are other foreign providers operating in Canada or delivering crossborder program at the sub-degree level, but systematic information on what types and level of programs, in which provinces and in what kind of partnerships is just not available.

South America

In Mexico, the University of the Incarnate Word (UIW), a private US institution from Texas opened a new campus in 2003. Other American institutions with Mexican campuses include Endicott College and Alliant International University, and Texas A&M which has a 'university centre' in Mexico City (September 2003). In 2000, Laureate Education purchased the Universidad del Valle de Mexico and is currently planning to open a new Branch in Guadalajara. It also owns Universidad Interamericana, a private university with campuses in Costa Rica and Panama (November 2003) and part of three private universities in Chile (June 2003). Bologna University (Italy)

information on program mobility creates an undesirable environment of speculation, confusion and often misinformation. This can have negative consequences in terms of confidence in the quality and dependability of crossborder education provision and impedes the analysis needed to underpin solid policy and regulatory frameworks.

Australia is the leader in terms of having up-to-date and fairly comprehensive data from universities on the volume, types, award level, and discipline of crossborder program delivery. The Australian Vice-Chancellors Association, as well as Department of Education, Science and Technology collect, analyze and publish this data on an annual basis. In New Zealand, the International Policy and Development Unit of the Ministry of Education undertook in 2001, a major survey of crossborder delivery in all tertiary institutions but this is not an annual data gathering exercise yet. The UK Higher Education Statistics Agency has collected information for the 2002/03 academic year on UK education programs offered abroad. This is the first time it has gathered this data and published its findings. This is definitely a step forward, and there is news that OECD is also trying to develop a set of indicators to assist with the collection of

program and provider movement in OECD countries in the future.

An examination of the information from Australia, New Zealand and UK reveals differences in approach to data collecting and interpretation. To the extent possible, a comparative analysis was done in order to see if there were noteworthy similarities and differences. In

order to manage a degree of comparability, some of the raw quantitative data was converted into percentages. It is emphasized that the information presented in Chart Three is for illustrative purposes only. It is also noted that these three reports provide data on the export of programs and do not provide information on any crossborder education coming into their jurisdiction.

However, it is probably fair to say that the number of crossborder programs and providers being imported into these three countries is insignificant compared to the number of outgoing programs and providers.

It is not surprising that the crossborder activity of these three countries is mainly concentrated in the Asia Pacific region. This is due to reasons of geographical proximity, historical and linguistic ties, and most importantly the fact that many Asian countries do not have the capacity to meet the increasing local demand for tertiary level education.

Asia is certainly the region to watch for new developments. As this analysis shows, Malaysia, Singapore,

THE UK HIGHER EDUCATION STATISTICS AGENCY HAS COLLECTED INFORMATION FOR THE 2002/03 ACADEMIC YEAR ON UK EDUCATION PROGRAMS OFFERED ABROAD. THIS IS THE FIRST TIME IT HAS GATHERED THIS DATA AND PUBLISHED ITS FINDINGS.

is one of the few foreign institutions with a branch campus in Argentina. In terms of exporting, the Technical Institute of Monterrey (ITESM) in Mexico is well known for its on line education programs, especially the MBA, delivered to many countries in Latin America.

These new initiatives illustrate the diversity of education activities by conventional higher education institutions and new commercial providers. They demonstrate the range of countries and types of partnerships being formed to promote, exchange, link and predominantly sell higher education across borders.

Comparative analysis of Australia, UK and New Zealand HEIs crossborder program activity

As already pointed out, one of the glaring challenges in trying to analyze the implications of crossborder delivery of education programs is the lack of data. While there is more reliable information and informed analysis on the movement of students across borders, the paucity of

CHART THREE: COMPARATIVE DATA ON PROGRAMS OFFERED ACROSS BORDERS

	United Kingdom	Australia		New Zealand
Year data collected	2002/03	1999/2000	2003	2001
Percent of HEIs delivering cross-border programs		88% of universities		47% of all (38) public HEIs (88% of universities)
Number of students in crossborder programs	101,645	34,905	97,751	2,200 (increase from 380 in 1997)
Number of cross-border programs			1,569	63 programs (increase from 6 in 1997)
Primary locations	Hong Kong	Hong Kong Malaysia Singapore	China, Hong Kong, Singapore Malaysia Represent 70% of crossborder delivery	Malaysia 23% China 9% Australia 9% Hong Kong 6% Singapore 6%
Level of degrees	Undergrad 56% Graduate 44%			Sub-degree 34% Undergrad 39% Post grad 27%
Primary disciplines	Business 44% Joint Degrees 21% Law 13% IT 8.5%		Business Administration Economics	Bus/Commerce 15% Special Medicine 15% Computer Science 14% Management 13%
Spread of activity among HEIs	10 institutions account for 81% of crossborder enrolments			3 institutions account for 55% of all cross-border program delivery
Mode of Delivery				42% through campus based teaching 32% through distance only 26% used combination
Source of Data	HESA 2002/03 London External 2002/03 – As reported by OBHE July 2004	DEST Overseas Student Statistics 2000	AVCC Offshore Programs of Australian Universities 2003	Ministry of Education 2002

China and to a lesser extent Thailand, India and Vietnam have been the most popular destination countries during the last five to ten years. During this period, maelstroms of new types of partnerships have developed through franchising, twinning and articulation programs between foreign HEIs and local HEIs and private companies. These receiving countries have learned a great deal from their foreign partners and are currently being more proactive and strategic in exporting their own programs and providers to neighbouring countries in Asia and the Middle Eastern countries. This includes a substantial number of private commercial companies such as Raffles LaSalle, Informatics and Hartford in Singapore, Aptech and NIIT from India and SEG and Stamford College in Malaysia. Given that Asia will represent approximately 70% of the global demand in 2025 (IDP 2002), this part of the world will be the region to carefully watch for new trends and developments.

4.0 TOWARDS A TYPOLOGY FOR NEW CROSSBORDER PROVIDERS AND DELIVERY MODES

It is exciting, confusing and slightly overwhelming to track new developments in the movement of programs and providers across borders. The number of new actors involved in the promotion, provision and regulation of crossborder education is increasing exponentially. Whether one is supportive or critical of the change, the reality is that the education sector in many countries is becoming a competitive and dynamic market place for both local and foreign providers.

Given the increase in demand for higher education, there are new providers, new delivery methods and new types of programs. These new providers include media companies such as Pearson (UK), Thomson (Canada), multinational companies such as Apollo (USA), Informatics (Singapore) and Aptech (India), corporate universities such as those run by Motorola and Toyota, and networks of universities, professional associations and organizations. Generally, these new commercial providers are mainly occupied with teaching/training or providing services and do not focus on research per se. They can complement, cooperate, compete or simply coexist with the traditional public and private higher education institutions whose mandate is traditionally the trinity of teaching, research and service. However, as Section 3 illustrates, it is not just for-profit companies that are becoming increasingly interested in commercial crossborder initiatives. Conventional higher education institutions, both private and public, are also seeking

opportunities for commercial delivery of education programs in other countries. The majority of these are bona fide institutions that comply with domestic and foreign regulations (where they exist), but there is also an increase in rogue or low quality providers not recognized by bona fide accreditation/licensing bodies. In addition, there is a worrisome increase in the number of “degree mills” operating around the world. These are often no more than web based companies that are selling certificates based on ‘life experiences’ and are not delivering education programs at all.

The expansion in numbers and types of entities that are providing education courses and programs across borders is causing some confusion and chaos. This also applies to the modes of crossborder program mobility and provider mobility. This general state of flux may well indicate progress and innovation but it also begs for some kind of classification system or typology in order to make sense of the new ‘playing field’ of crossborder education.

The following sections present a first attempt at developing three distinct typologies for the different types of providers, the different means of program mobility and the various ways that providers are moving across borders. A key factor underlying these typologies is that the type of provider is purposely separated from the mode of mobility. To date, much of the discussion about program and provider mobility has consciously or unconsciously linked the type of provider with a certain mode of delivery. This is one of the reasons for the state of confusion and therefore, a generic classification system for crossborder providers is proposed. A second typology on the different modes of program mobility is presented. It is important to emphasize that the different forms of program mobility can apply to any or all of the providers. A third typology focuses on the ways that providers move across borders. This typology rests on the assumption that the movement of ‘individual or a set of programs’ needs to be differentiated from the movement and presence of ‘providers’. Again the third typology is applicable to the full range of providers.

4.1 TYPOLOGY OF PROVIDERS

This typology is a work in progress. As already mentioned, the term provider is used as a generic term to include all types of higher education institutions as well as companies and networks involved in crossborder education. It is an attempt to conceptually map the diversity of actors and to separate the type of provider from the form of crossborder delivery. The key factors used to describe each category of provider and to distinguish one category from another are the following:

CHART FOUR: TYPOLOGY OF CROSSBORDER/INTERNATIONAL PROVIDERS

Category	Status	Orientation	Notes
Recognized HEIs	Can be public, private or religious institutions Usually part of home national education system and recognized by national bona fide licensing/accrediting body	Can be non-profit or profit oriented	Known as traditional type of HEI focusing on teaching, research and service
Non-recognized HEIs	Usually private and not formally part of national education system Includes HEIs that provide a course of study but are not recognized by national bona fide licensing/ accreditation body If the non-recognized HEIs are of low quality they are often referred to as 'rogue' providers	Usually profit oriented	'Diploma mills' sell degrees but do not provide programs of study and are related to crossborder education but are not true providers 'Rogue providers' are often accredited by agencies that are selling accreditations (accreditation mills) or by self-accrediting groups or companies
Commercial Company HEIs	Can be publicly traded company (see Global Education Index of OBHE) or privately owned Includes: 1. Companies that establish HEIs that may or may not be 'recognized' by bona fide licensing/ accrediting bodies 2. Companies that focus more on the provision of services Usually not part of 'home' national education system Profit oriented Known as type of "new provider"	Profit oriented	Known as type of "new provider" Can include variety of companies (i.e. media, IT, publishing) that provide education programs and support services. Can complement, cooperate, compete or co-exist with more traditional HEIs
Corporate HEIs	Not part of home national education system Usually part of major international corporation and outside of national education system. Not usually recognized by national bona fide licensing/ accreditation body	Not relevant	Known as type of "new provider" Often collaborate with traditional HEIs especially for degree awarding power
Affiliations/ Networks	Can be combination of public/public or public/private or private/private organizations and HEIs	Usually profit oriented	Known as type of "new provider"
Virtual HEIs	The affiliations/networks may or may not be part of home national education system; and they may or may not be recognized by national bona fide licensing/accreditation body. However some of the individual partners may be Includes HEIs that are 100% virtual	Usually profit oriented if delivering crossborder	Difficult for receiving national education system to monitor or regulate international virtual HEIs due to distance delivery methods
NOTE:	<i>Home country means country of origin or sending/ source country. Host country means receiving country</i>		

- Public, private or religious
- Non-profit or for-profit
- Recognized by a bona fide national licensing/accrediting body
- Part of the national 'home' higher education system

The proposed typology is purposely generic and does not provide specific details on the characteristics of each category of provider. The typology is oriented to international academic provision but may have some relevance for domestic delivery as well. There is a flow of announcements about new providers and new forms of partnerships between providers. It is an evolving field that needs to be monitored and this is why the typology is a work in progress.

The description and classification of the different types of new crossborder providers is challenging. The tendency is to use factors inherent to traditional HEIs and apply them to new providers. This may change over time.

One of the central issues is who recognizes and gives the provider the power to award the qualifications in the 'home or sending country' and/or in the 'host or receiving country'. However, as previously pointed out some of the 'new providers' are not part of, or are not recognized by, a 'home' national education system. This question will be addressed in Section 5 on "Issues and Implications". Another challenge in developing a typology is that the terms 'public, private and religious' are interpreted and used in different ways among countries (and sometimes within countries as well). The emergence of new trade regulations applying to education services usually means that all commercial crossborder providers are considered to be private by the host/receiving country regardless of their status at home. This adds yet another complicating dimension to the task. Furthermore, the definition of the terms profit and non-profit also varies among countries. It is interesting to follow the changes in national regulatory systems for crossborder education (especially in China, India, Malaysia, Japan and South Africa) in terms of these issues, and especially how profit and non-profit education entities and services are defined.

4.2 TYPOLOGY OF PROGRAM MOBILITY

Crossborder mobility of programs can be described as 'the movement of individual education/training courses and programs across national borders through face-to-face, distance or a combination of these modes. Credits towards a qualification can be awarded by the sending foreign country provider or by an affiliated domestic partner or jointly.' Program mobility can involve the delivery of individual courses and programs

of a comprehensive HEI, thus the crossborder profile of an institution/provider may be different from the home profile. On the other hand, program mobility can also involve the only program or course offered by a provider. Franchising, twinning, double/joint and other articulation models are the more popular methods of crossborder program mobility.

It is clear that a key factor in program mobility is 'who' awards the course credits or ultimate credential for the program. As the movement of programs proliferates, there will undoubtedly be further changes to national, regional and even international regulatory frameworks. The question of 'who grants the credits/awards' will be augmented by 'who recognizes the provider' and whether or not the program has been 'accredited or quality assured' by a bona fide body. Of critical importance is whether the qualification is recognized for employment or further study in the receiving country and in other countries as well. The perceived legitimacy, recognition and ultimate mobility of the qualification are fundamental issues yet to be resolved.

Given that several modes for program mobility involve partnerships there are questions about who owns the intellectual property rights to course design and materials. What are the legal and moral roles and responsibilities of the participating partners in terms of academic, staffing, recruitment, evaluation, financial, and administrative matters. While the movement of programs across borders has been taking place for many years, it is clear that the new types of providers, partnerships, awards and delivery modes are challenging national and international policies and regulatory frameworks.

4.3 TYPOLOGY OF PROVIDER MOBILITY

Crossborder mobility of provider can be described as 'the physical or virtual movement of an education provider across a national border to establish a presence to provide education/training programs and/or services to students and other clients.' The difference between program and provider mobility is one of scope and volume in terms of programs/services offered and the local presence (and investment) by the foreign provider. Credits and qualifications are awarded by the foreign provider (through foreign, local or self-accreditation methods) or by an affiliated domestic partner or jointly. Forms of crossborder provider mobility include branch campuses, mergers with or acquisitions of domestic providers, independent institutions, study and support centres plus other types of innovative affiliations. A distinguishing feature between program and provider mobility is that with provider mobility the learner is not necessarily located in a different country than the awarding institution.

CHART FIVE: TYPOLOGY OF CROSSBORDER PROGRAM MOBILITY MODES

Category	Description	Examples
Franchise	An arrangement whereby a provider in the source country A authorizes a provider in another country B to deliver their course/program/service in country B or other countries. The qualification is awarded by provider in country A.	Arrangements for teaching, management, assessment, profit-sharing, awarding of credit/qualification, etc. are customized for each franchise operation.
Twinning	A situation whereby a provider in source country A collaborates with a provider located in country B to develop an articulation system allowing students to take course credits in country B and/or source country A. Only one qualification is awarded by provider in source country A.	Arrangements for twinning programs and awarding of degree usually comply with national regulations of the provider in the source country A.
Double/Joint Degree	An arrangement whereby providers in different countries collaborate to offer a program for which a student receives a qualification from each provider or a joint award from the collaborating providers.	Arrangements for program provision and criteria for awarding the qualifications are customized for each collaborative initiative in accordance with national regulations.
Articulation	Various types of articulation arrangements between providers in different countries permit students to gain credit for courses/programs offered/delivered by collaborating providers.	Allows students to gain credit for work done with a provider other than the provider awarding the qualification.
Validation	Validation arrangements between providers in different countries which allow provider B in receiving country to award the qualification of provider A in source country.	In some cases the source country provider may not offer these courses or awards themselves.
Virtual/Distance	Arrangements where providers deliver courses/program to students in different countries through distance and on line modes. May include some face to face support for students through domestic study or support centres.	

CHART SIX: TYPOLOGY OF CROSSBORDER PROVIDER MOBILITY MODES

Category	Description	Examples
Branch Campus	Provider in country A establishes a satellite campus in country B to deliver courses and programs to students in country B. (may also include country A students taking a semester/courses abroad). The qualification awarded is from provider in country A.	Monash University from Australia has established branch campuses in Malaysia and South Africa. University of Indianapolis has a branch campus in Athens.
Independent Institution	Foreign provider A (a traditional university, a commercial company or alliance/network) establishes a stand alone HEI in country B to offer courses /programs and awards.	The German University in Cairo, Phoenix Universities in Canada and Puerto Rico (Apollo Group).
Acquisition/Merger	Foreign provider A purchases a part of or 100% of local HEI in country B.	Laureate has merged with and/or purchased local HEIs in Chile, Mexico and other LA countries.
Study Centre/Teaching Site	Foreign provider A establishes study centres in country B to support students taking their courses/programs. Study centres can be independent or in collaboration with local providers in country B.	Texas A&M has 'university centre' in Mexico City. Troy University (US) has MBA teaching site in Bangkok.
Affiliation/Networks	Different types of 'public and private', 'traditional and new' providers from various countries collaborate through innovative types of partnerships to establish networks/institutions to deliver courses and programs in local and foreign countries through distance or face-to-face modes.	Partnership between the Caparo Group and Carnegie Mellon University to establish campus in India. Netherlands Business School branch campus in Nigeria in partnership with African Leadership Forum (NGO).
Virtual University	Provider that delivers credit courses and degree programs to students in different countries through distance education modes and that generally does not have face to face support services for students.	International Virtual University, Hibernia College, Arab Open University.

5.0 ISSUES AND IMPLICATIONS

The typologies of crossborder providers and the different means and arrangements for providing education across national boundaries illustrate the diversity of actors, types of provision, delivery methods and rationales, driving the whole enterprise of crossborder education. It is easy to become overwhelmed with the number, variety and complex relationships among the issues and challenges. This section focuses primarily on issues that relate to recognition of providers, programs and credits/qualifications at national and international levels. This does not diminish the importance of academic and administrative implications for individual providers and especially traditional higher education institutions. These are noted but not elaborated on in Section 5.6.

At the current time, there are five macro issues that are receiving the most attention and which have different dimensions and consequences for the various types of providers. These issues are interrelated and all are influenced by regulations of the sending and the receiving country. The first issue is the licensing or registering of institutions/providers that are delivering across borders

THE TYPOLOGIES OF CROSSBORDER PROVIDERS AND THE DIFFERENT MEANS AND ARRANGEMENTS FOR PROVIDING EDUCATION ACROSS NATIONAL BOUNDARIES ILLUSTRATE THE DIVERSITY OF ACTORS, TYPES OF PROVISION, DELIVERY METHODS AND RATIONALES, DRIVING THE WHOLE ENTERPRISE OF CROSSBORDER EDUCATION.

courses/programs and hence qualifications. Are they recognized and part of the home national system and also recognized/licensed in the receiving country? The second issue focuses on the quality of the courses/programs being offered and the quality of the academic experience of the student. The third issue follows on the same theme and focuses on the role of accreditation and the more recent trends of internationalization and commercialization of accreditation for worldwide status and profile, rather than for standards. The fourth issue addresses the recognition of the actual award or qualification being offered for purposes of employment and further study. This point relates directly to the importance of student/employer and public being aware of the quality and validity of the programs and awards

provided. The fifth issue focuses on the challenge and need for a review of the policy and regulatory environments in which program and provider mobility is operating.

5.1 REGISTRATION AND LICENSING OF FOREIGN PROVIDERS

A fundamental question is whether the institutions, companies and networks that are delivering award-based programs are registered, licensed or recognized by the receiving country. The answer to this question varies. There are many countries that do not have the regulatory systems in place to register out of country providers. Several reasons account for this, including lack of capacity or political will. If providers are not registered or recognized it is difficult to monitor their performance. It is usual practise, that if an institution/provider is not registered as part of a national system, then regulatory frameworks for quality assurance or accreditation do not apply. This is the situation in many countries in the world and hence foreign providers (*bona fide* and *rogue*) do not have to comply with national regulations.

The questions and factors at play in the registration or licensing of foreign providers are many. For instance, are there different criteria or conditions applicable to those providers who are part of and recognized by a national education system in their home country than for those providers who are not? Does it make a difference if the provider is for-profit or non-profit, private or public, an institution or a company? What conditions apply if in fact the provider is a company that has

no home based presence and only establishes institutions in foreign countries? How does one track all the types of partnerships between local domestic institutions/companies and foreign ones? Is it even possible to register a completely virtual provider? Clearly, there are challenges and difficulties involved in trying to establish appropriate and effective national or regional regulatory systems.

Often there are bilateral cultural/academic agreements in place to facilitate and monitor the foreign presence of education providers. However, the fact that education services are now part of bilateral and multilateral trade agreements introduces new regulations and challenges. The existence of trade agreements that aim to liberalize and promote trade in education services is a rela-

tively recent factor to be considered. Trade agreements can help to provide new opportunities, but also present new dilemmas. A key question facing national governments, as well as international organizations, is to what extent will the introduction of new national regulations to license or recognize out of country providers be interpreted as barriers for trade and therefore need to be modified to comply with trade policies.

All and all, the issue of regulating and licensing providers that deliver education across borders needs further attention. Consideration of what national, regional and international policies and frameworks are necessary and feasible in light of new trade regulations merits study by the education sector. This is a complex and urgent issue.

5.2 ASSESSING AND ENSURING QUALITY ASSURANCE

If we thought questions related to registration and licensing were complex, it becomes even more complicated when one looks at accreditation and quality assurance of providers and imported/exported education programs. The terms accreditation and quality assurance have different meaning and significance depending on the country, actor or stakeholder using the term. Terminology related to quality is a minefield and the cause of much debate and confusion at the international level. For the purposes of this discussion, quality recognition and assurance is used in a general sense and includes quality audit, evaluation, accreditation and other review processes and elements. This generic approach is not meant to diminish the differences in meaning and approach used by various countries. However, a macro interpretation of quality recognition and assurance of crossborder education is needed to attract the attention that this issue deserves.

Firstly, it must be noted that increased importance has certainly been given to quality assurance at the institutional level and at the national level in the past decade. Quality assurance mechanisms and national organizations have been developed in over 60 countries. New regional quality networks have also been established. The primary task of these groups has been to assess and assure quality of domestic higher education provision of public and private higher education institutions. However, the increase in crossborder education by institutions and commercial companies has introduced a new challenge to the field of quality assurance. Historically, national quality assurance agencies have generally not focussed their efforts on assessing the quality of imported and exported programs, with some notable exceptions. Hong Kong, Malaysia, South Africa and Israel, as receivers of cross-

border providers and programs have developed regulatory systems to register and monitor the quality of foreign provision. The United Kingdom and Australia are examples of sending countries that have introduced quality assurance for exported crossborder provision by their recognized HEIs. The question now facing the sector is how does one deal with the increase in crossborder education by public/private institutions, and in particular by the new private commercial companies and providers who are not part of, or recognized by nationally based quality assurance schemes.

It is probable that sectors, in addition to education, will be interested in developing international quality standards and procedures for education. ISO standards, or other industry-based mechanisms such as the Baldrige Awards are examples of quality systems that might be applied or modelled for crossborder education. The education sector has mixed views on the appropriateness of quality standards being established for education by those outside the sector. At the same time, there are divergent opinions on the desirability and value of any international standards or criteria for quality assurance as this might jeopardize the sovereignty of national level systems or contribute to standardization — not necessarily quality standards. This issue is complex and there are many different actors and stakeholders involved. However, given the realities of today's growth in the number and types of crossborder education providers there is a sense of urgency to the question of how to ensure the quality of imported and exported education providers and programs.

5.3 ACCREDITATION — COMMERCIALIZATION AND INTERNATIONALIZATION?

Market forces are making the profile and reputation of an institution/provider and their courses more and more important. Major investments are being made in marketing and branding campaigns in order to get name recognition and to increase enrolments. The possession of some type of accreditation is part of the campaign and assures prospective students that the programs/awards are of high standing. This is introducing an internationalization and even commercialization dimension to accreditation practices. However, it is very important not to confuse commercial bona fide accreditation agencies with 'accreditation mills'.

It is interesting to note the increase in the number of bona fide national and international accreditation agencies now working in over 50 countries. For instance, the US national and regional accrediting bodies are providing/selling their services in over 65 countries. The

same trend is discernible for accreditation bodies of the professions such as ABET (Engineering) from the US and EQUIS (Business) from Europe.

At the same time, there are networks of institutions and new organizations that are self-appointed and engage in accreditation of their members. These are positive developments when seen through the lens of trying to improve the quality of the academic offer. However, there is some concern that they are not totally objective in their assessments and may be more interested in contributing to the race for more and more accreditation 'stars' than to improving quality. Another related and more worrisome development is the growth in accreditation mills. These organizations are not recognized or legitimate bodies and they more or less 'sell' accreditation status without any independent assessment. They are similar to degree mills that sell certificates and degrees with no or minimal course work. Different education stakeholders, especially students, employers and the public, need to be aware of these accreditation (and degree) mills which are often no more than a web address and are therefore out of the jurisdiction of national regulatory systems.

5.4 RECOGNITION OF QUALIFICATIONS

The need to have mechanisms that recognize academic and professional qualifications gained through domestic or international delivery of education is another important consequence of increased crossborder activity. The key questions are who awards the qualification, especially in private company providers and networks, is the provider recognized, if so by what kind of accrediting/licensing body and in what country is that body located? Given the importance of both student mobility and professional labour mobility, within and between countries, the mechanisms for qualification recognition have to be national, regional and or international in nature and application.

UNESCO has long acknowledged the requirement of an international system to facilitate and ensure recognition of academic and professional qualifications. Regional UNESCO conventions on the Recognition of Qualifications were established more than 25 years ago and have been ratified by over 100 Member States in Africa, Asia and the Pacific, the Arab States, Europe and Latin America. They are unique legally binding instruments dealing with crossborder mutual recognition of qualifications. There is limited awareness of these instruments except for the European regional convention, which in 1997 was updated jointly by UNESCO and the Council of Europe in the form of the Lisbon Convention. At the present time, there is discussion on

how these UNESCO conventions can be used as instruments to assure students, employers and the public that there are systems in place to recognize academic and professional qualifications. Given the growth in academic mobility and the increased mobility of the labour force there is a clear and urgent need that this issue be addressed. Questions are also being raised as to whether these UNESCO conventions can be strengthened or whether alternative regional or international agreements should be developed.

The credibility of higher education programs and qualifications is extremely important for students, employers, the public at large and for the academic community itself. Additional efforts are needed at institutional, national and international levels to keep the different stakeholders cognizant of new opportunities for education and professional mobility but also new risks such as rogue providers, and diploma and accreditation mills and the more subtle issues related to new providers and new qualifications. The larger and perhaps most critical issue is assurance that the education and the qualification awarded are legitimate and will be recognized for employment purposes or for further studies either at home or abroad. This is a major challenge facing the national and international higher education sector at the present time.

5.5 NATIONAL, REGIONAL AND INTERNATIONAL FRAMEWORKS

Of current interest and debate, is whether national level accreditation and quality assurance systems (where they exist) are able to attend to the complicating factors of education mobility across countries, cultures and jurisdictional systems. A fundamental question is whether countries have the capacity to establish and monitor quality systems for both incoming and outgoing education programs given the diversity of providers and delivery methods. Should national quality/accreditation systems be complemented and augmented by regional or international frameworks? Is it advisable and feasible to develop mutual recognition systems between and among countries? Would an International Code of Good Practice be appropriate or strong enough to monitor quality? These are key questions for the education sector to address.

Both UNESCO and OECD have identified the accelerated growth and increasing importance of crossborder education as a priority area for the higher education sector. Together they are working on two new initiatives. The first is the "UNESCO/OECD Guidelines for Quality Provision in Crossborder Higher Education." The purpose of the joint guidelines is to 'ensure that the

quality of crossborder provision of higher education is managed appropriately to limit low quality provision and rogue providers and to encourage those forms of cross-border delivery of higher education that provide new opportunities, wide access and increase the possibilities of improving the skills of individual students' (UNESCO/OECD 2004). The Joint Guidelines are based on the principle of mutual trust and respect among countries and recognize the importance of national authority and activity in education policy making. The guidelines make recommendations for six key stakeholder groups: national governments, higher education institutions/providers, student groups, quality assurance and accreditation agencies, credential and qualification evaluation groups and professional bodies. As guidelines, they are without any regulatory power, but they are critical to ensuring that crossborder education provision is a priority issue and receives attention and action by key stakeholders. A second joint activity is the development of "An Information Tool on Recognized Higher Education Institutions". This is an important adjunct to the guidelines and will provide concrete information about higher education institutions that are recognized by a competent body in participating countries.

As the discussion moves forward it will be of strategic and substantive importance to recognize the roles and responsibilities of all the players involved in quality assurance including individual institutions/providers, national quality assurance systems, non-government and independent accreditation bodies, and regional/international organizations. It will be important to work in a collaborative and complementary fashion to build a system that ensures the quality and integrity of crossborder education and maintains the confidence of society in higher education.

5.6 CODES OF CONDUCT

Codes of conduct for crossborder/transnational education have been developed by several national university associations, quality agencies and government departments. They are usually a set of principles to guide the practice of delivering programs across borders and for establishing partnerships with foreign providers. They are intended for public and private higher education institutions but have relevance, but no imperative, for other providers as well. The codes differ in substance and perspective but they are similar in spirit and purpose which is to assure quality in crossborder academic provision regardless of mode of delivery and partnership model, and maintain the integrity of the academic credit and qualification. Examples of these codes include:

- Quality Assurance Code of Practice: Collaborative

Provisions — UK Quality Assurance Agency:

www.qaa.ac.uk/public/COP/cprovis/contents.htm

- Code of Ethical Practice in the Offshore Provision of Education and the Educational Services by Higher Australian Higher Education Institutions — Australian Vice-Chancellors Committee: www.avcc.edu.au/news/whats_new/wnarch.htm
- Principles of Good Practice for Educational Programs for Non-US Nationals: www.neasc.org/cihe/overseas_programs.PDF
- Code of Good Practice in the Provision of Transnational Education — UNESCO/CEPES and the Council of Europe: www.cepes.ro/hed/recogn/groups/transnat/code.htm
- Code of Conduct for Crossborder/Transnational Delivery of Higher Education Programs — South African Ministry of Education
- Code of Practice for Overseas Education Institutions Operating in Mauritius — Tertiary Education Commission: tec.intent.mu/distanceEdu.htm

5.7 IMPLICATIONS FOR HEIs

It would be wrong if one were left with the impression that these issues do not have implications for individual providers and especially higher education institutions. Quality assurance starts with the provider who is delivering the program — domestically or internationally. Most HEIs have adequate quality assurance processes in place for domestic delivery, but these processes do not cover all the aspects of delivering abroad. The challenges inherent in working cross-culturally, in a foreign regulatory environment and potentially with a partner raise new issues. These include academic entry requirements, student examination and assessment procedures, work load, delivery modes, adaptation of the curriculum, quality assurance of teaching, academic and socio-cultural support for students, title and level of award and others. Quality issues must be balanced with the financial investment and return to the source provider. Intellectual property ownership, choice of partners, division of responsibilities, academic and business risk assessments, internal and external approval processes are only some of the issues the HEIs need to be clear about.

6.0 CONCLUSION

This paper started with the statement, 'Globalization is transforming the world and internationalization is changing the world of higher education'. To end the paper, it may be more appropriate to say 'Globalization is transforming the world and crossborder mobility of programs and providers is challenging the world of higher education'.

The purpose of this paper has been to explore the scope and practice of delivering education across national borders. There is ample evidence that demand for higher education in the next 20 years will outstrip the capacity of some countries to meet the domestic need. Students moving to other countries to pursue their studies will continue and remain an important part of the international dimension of the higher education landscape. But student mobility will not be able to satisfy the enormous appetite for higher education from densely populated countries wanting to build human capacity to fully participate in the knowledge society. Hence the emergence and growing importance of crossborder education programs and providers.

A scan of trends, issues and new developments in program and provider mobility shows a diversity of new types of education providers, new delivery modes, innovative forms of public/private and local/foreign partnerships. New courses and programs are being designed and delivered in response to local conditions and global challenges, and new qualifications/awards are being conferred. The growth in the volume, scope and dimensions of crossborder education has the potential to provide increased access, and to promote innovation and responsiveness of higher education, but it also brings new challenges and unexpected consequences. There are the realities that unrecognized and rogue crossborder providers are active; that much of the latest crossborder education provision is being driven by commercial interests and gain; and that mechanisms to recognize qualifications and ensure quality of the academic course/program are still not in place in many countries. These present major challenges to the education sector. It is important to acknowledge the huge potential of crossborder education but not at the expense of academic quality and integrity.

Words like diversity, innovation, complexity, confusion, opportunities and challenges have been used repeatedly in this paper to describe the development and evolution of crossborder education. The education sector is not alone in looking at ways to guide, monitor and regulate the movement of education programs and providers. It needs to work in close cooperation with other sectors and to play a pivotal role in ensuring that crossborder education reflects and helps to fulfill each country's educational goals, culture, priorities and policies.

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